Switzerland.

Switzerland.

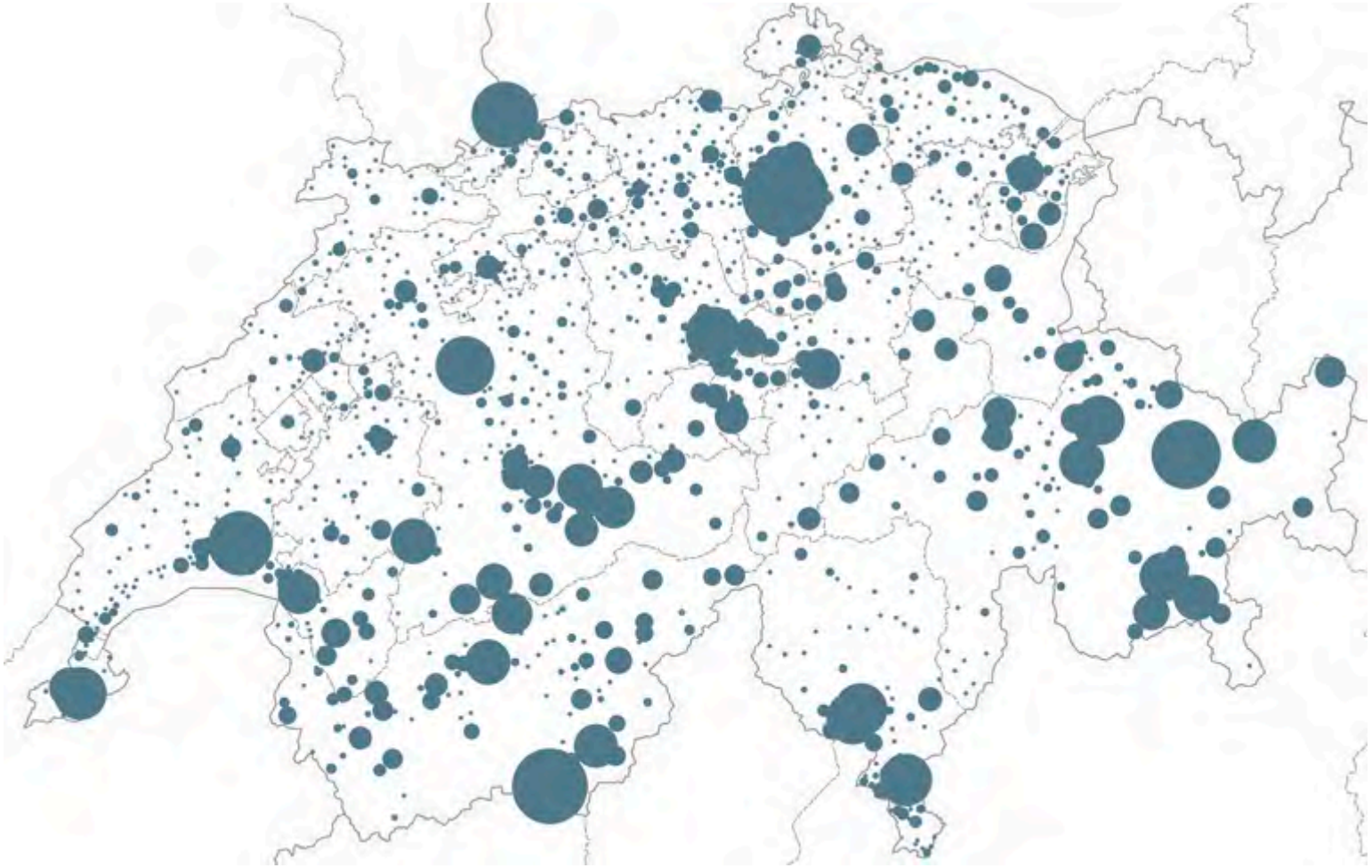
Key Partner Meetings 2019.

24th April 2019

Lucerne, Canton of Lucerne © Lauschsicht

Switzerland.

Switzerland.



Source: FSO, overnights year 2018

Chancen Schweiz.

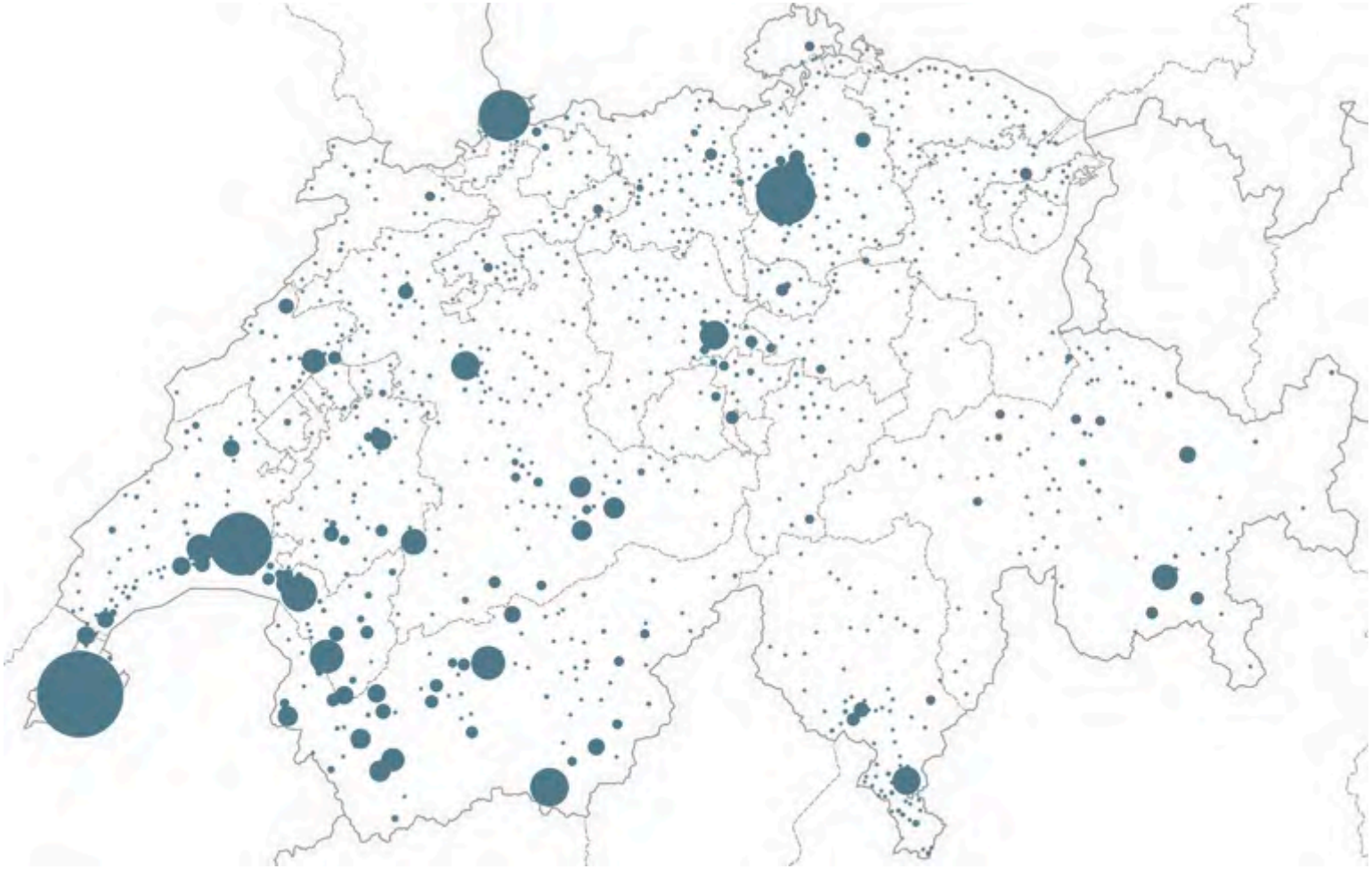
Switzerland.

- Fokus
  - Nature Lover, Outdoor Enthusiast, Attractions Tourer und Family: Monothematische Beilage in der NZZ am Sonntag.
  - Snow Lover, Snow Sports Enthusiast und Family: Monothematische Beilage in der Schweizer Illustrierte / L'Illustré.
  - 360° Special 20 Minuten: Crossmediales Package (12 Monate).
  - Expat-Marketing
  - Herbstsaison

- Was funktioniert in der Schweiz
  - Calanca statt Costa Rica, Ticino statt Teneriffa (Greta-Thunberg-Effekt).
  - Digital und Print (Beilagen cross-regional / Segment-fokussiert).

France.

Switzerland.



170’000

90’000

60’000

25’000

5’000

Source: FSO, overnights year 2018

Opportunities France.

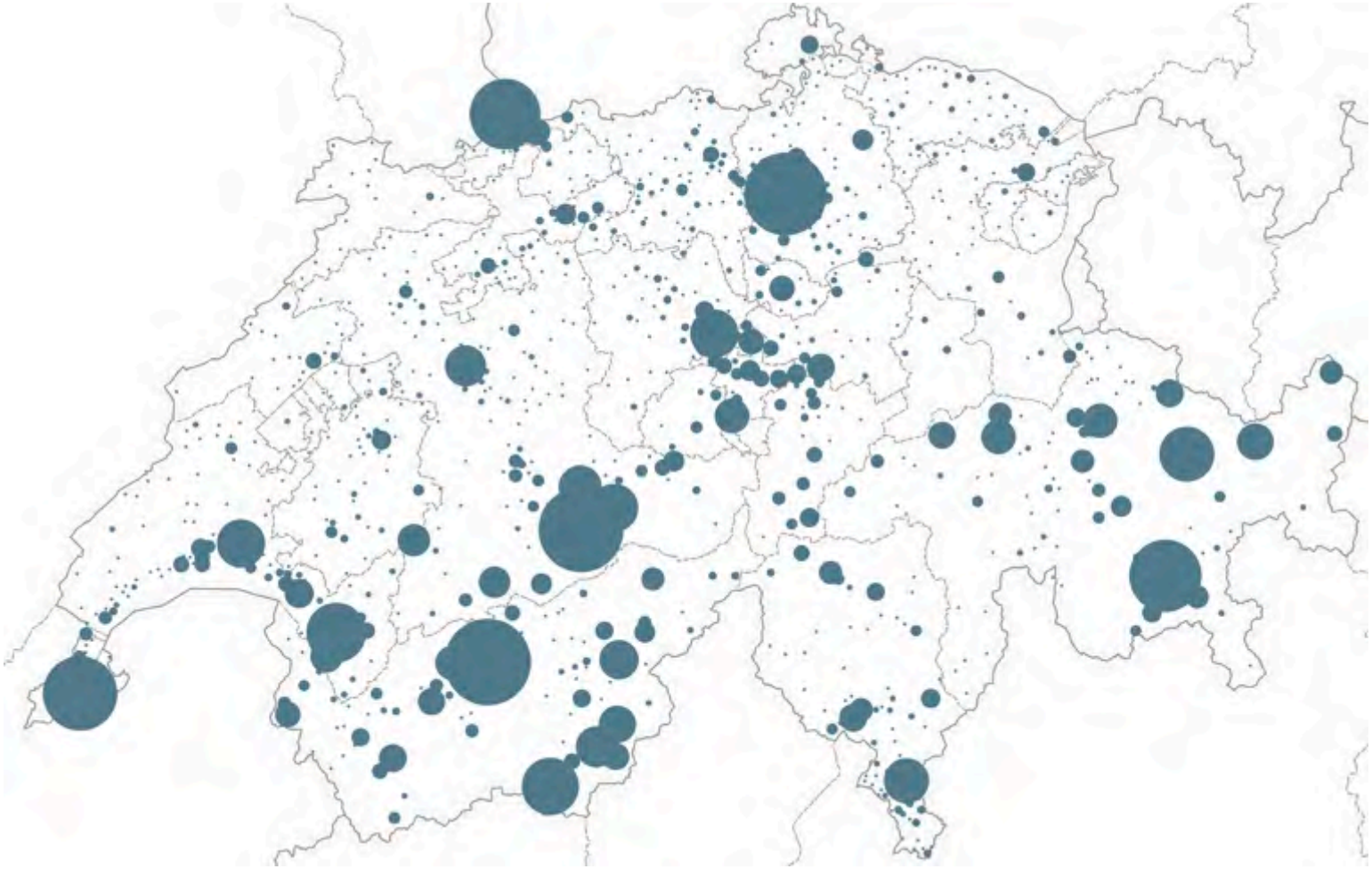
Switzerland.

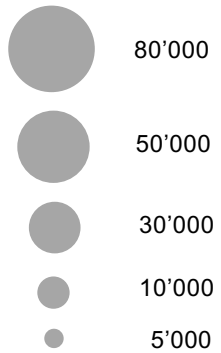
- Focus
  - Nature Lover
  - Attractions Tourer
  - Culture Traveller
  - Snow Lover

- What works in France
  - Feed your brain
  - Live the small differences
  - Active but not too much
  - Enjoy fine food

BeNeLux.

Switzerland.





Source: FSO, overnights year 2018

Opportunities Benelux.

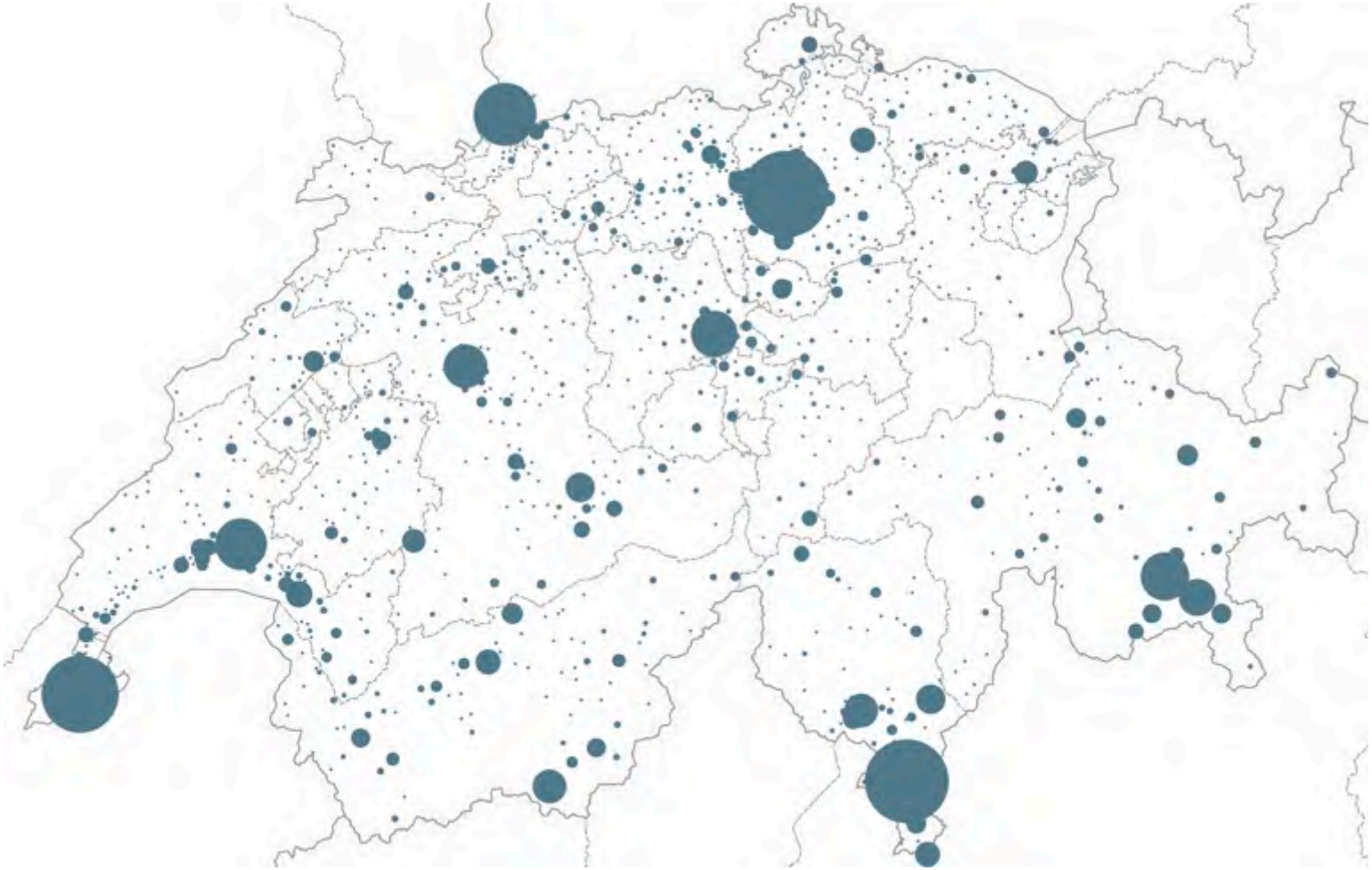
Switzerland.

- Focus
  - E-Bike is booming!
  - Take it easy!
  - Ski is key!

- What works in Belgium, the Netherlands and Luxembourg
  - Experiences that enable conscious travelling
  - Provide the real deal
  - Add the little extra

Italy.

Switzerland.



85’000

45’000

25’000

10’000

3’000

Source: FSO, overnights year 2018

Opportunities Italy.

Switzerland.

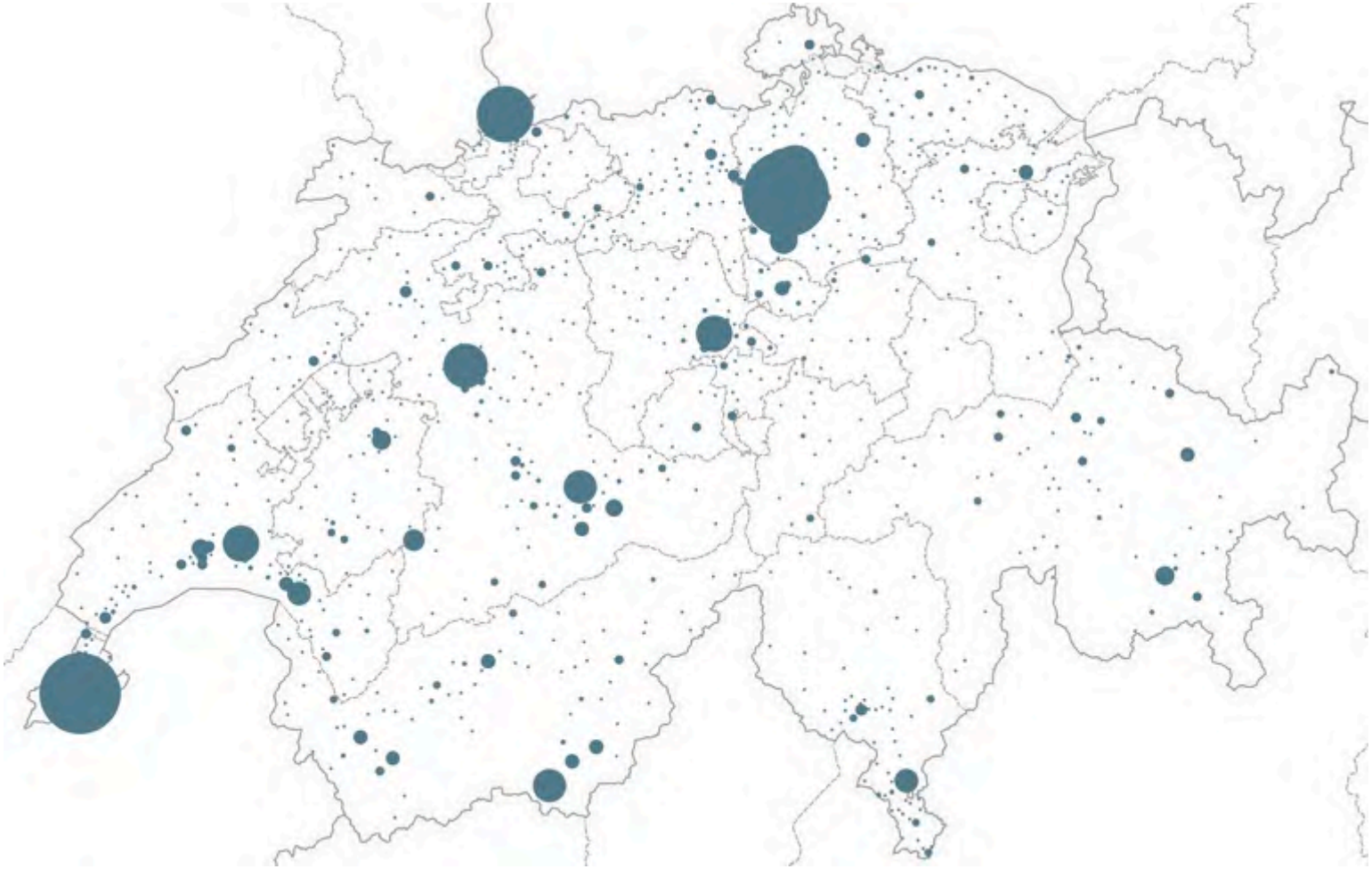
- Focus
  - Northern Italy
  - New & younger visitors
  - Alpine & urban hybrids
  - Ceneri opening 2020

- What works in Italy
  - Easy to reach & quietness = sustainability
  - Mountains & panorama = mountain & panoramic trains & boats
  - Cities & cultural offer in Switzerland

➡ Culture + nature + trains

Spain.

Switzerland.



80’000

35’000

20’000

11’000

3’000

Source: FSO, overnights year 2018

Opportunities Spain.

Switzerland.

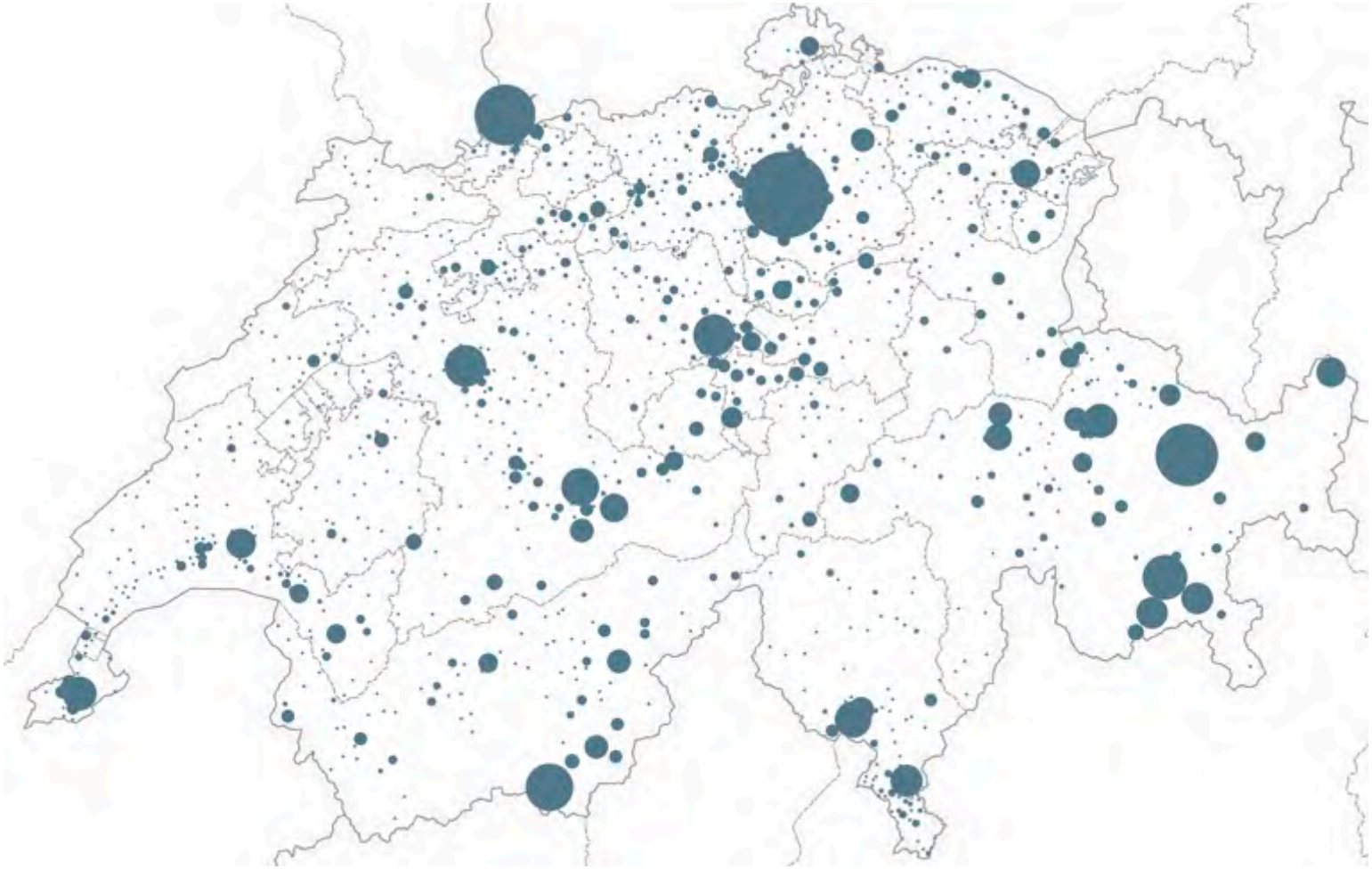
- Focus
  - Nature Lover: Breathtaking panoramas with Dolby surround
  - Attractions Tourer: A slow journey through a wow country
  - City Breaker & Culture Traveller: Booming all year around

- What works in Spain
  - Inspire me with user generated content
  - Clear up my doubts with maps, guides, blogs and brochures
  - And finally, conquer me with a tailor-made route

Switzerland.

Germany.

Switzerland.



395’000

200’000

110’000

50’000

20’000

Source: FSO, overnights year 2018

Opportunities Germany.

Switzerland.

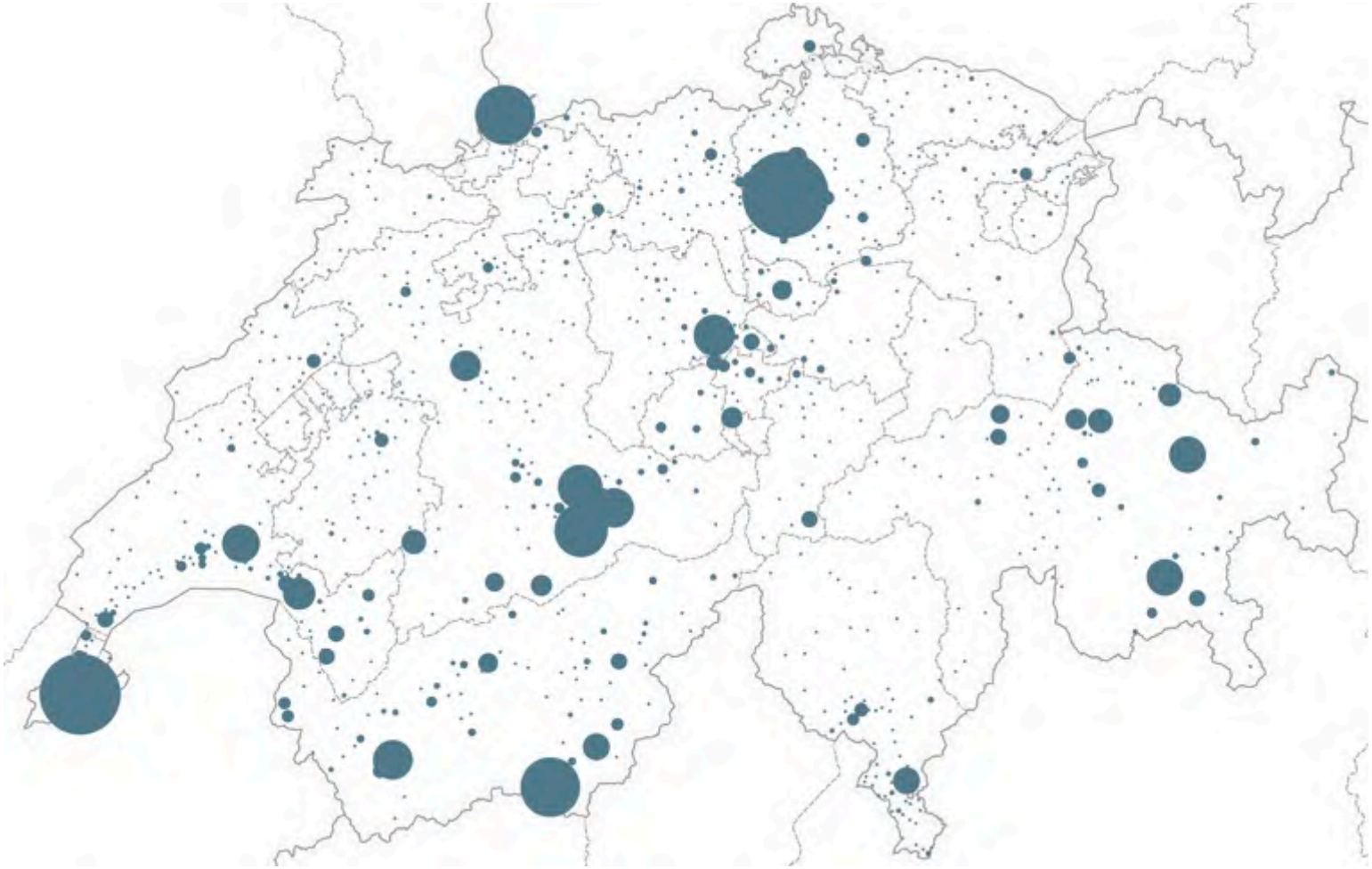
- Focus
  - Fall (summer season extension)
  - Individual media co-operations and individual direct marketing campaigns
  - KAM-Package (440'000 ON)

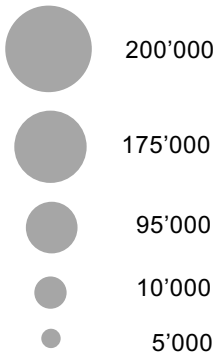
- What works in Germany
  - Reactivation of travelers from 65 to 75 years
  - New customer acquisition at "Win-back-Europe" (Greta effect!)
  - All-in marketing: The Germans are coming to all regions and destinations

- Incentive
  - ITB appearance for a Milestone winner

UK/Ireland.

Switzerland.





Source: FSO, overnights year 2018

Opportunities UK/Ireland.

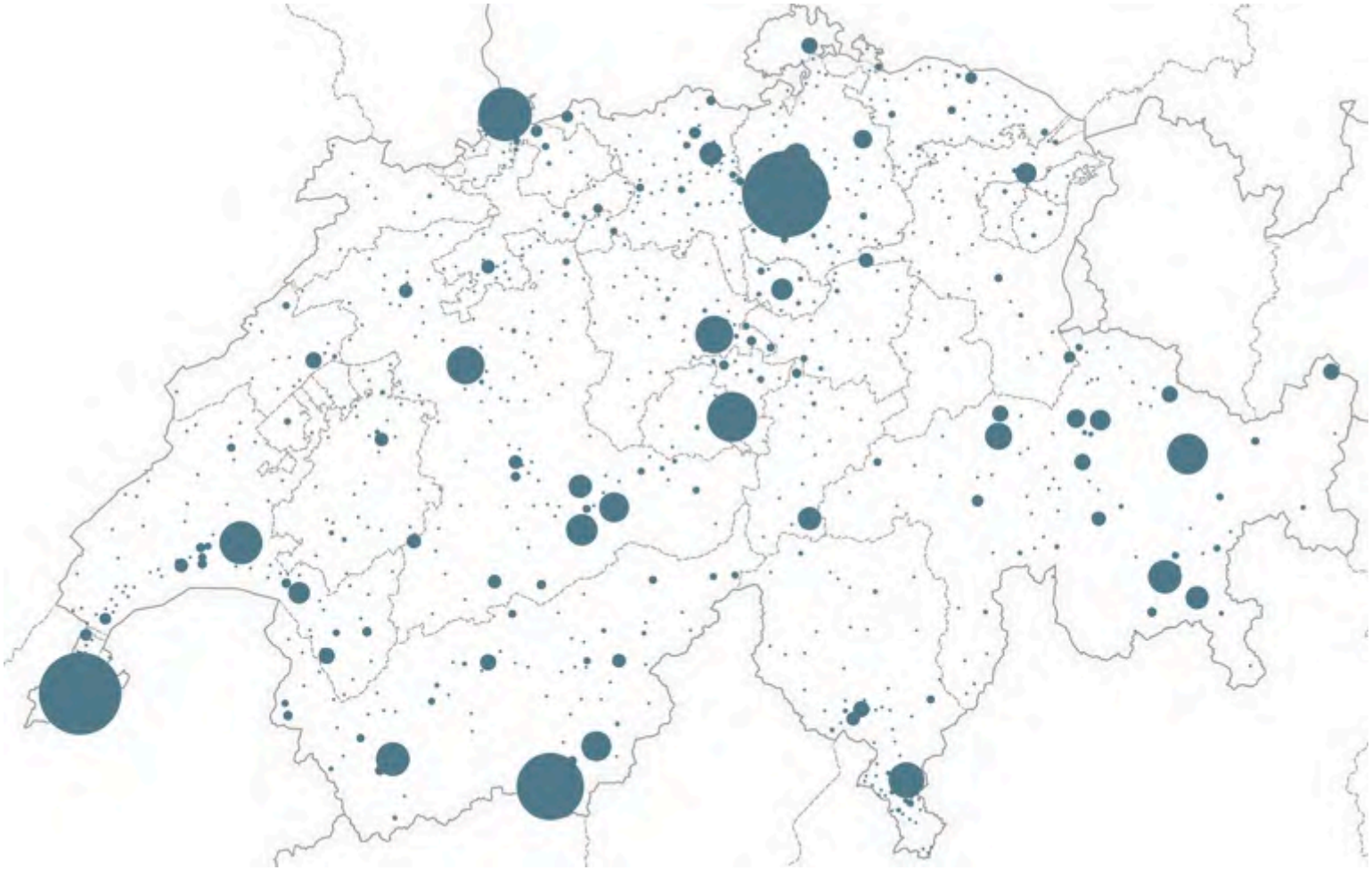
Switzerland.

- Focus
  - Nature Lover – Gardens, Herbs & Flowers of Switzerland
  - Outdoor Enthusiast – Continue build up hiking and cycling
  - City Breaker – Water / Swimming, Highlights at the water
  - Snow Lover / Snow Sports Enthusiast – Winter Heritage connection UK & CH

- What works in UK/Ireland
  - Water & Views
  - Hub & Spoke with Public Transport
  - Nature & Outdoor Activities

Nordics.

Switzerland.



55’000

35’000

15’000

5’000

1’500

Source: FSO, overnights year 2018

Opportunities Nordics.

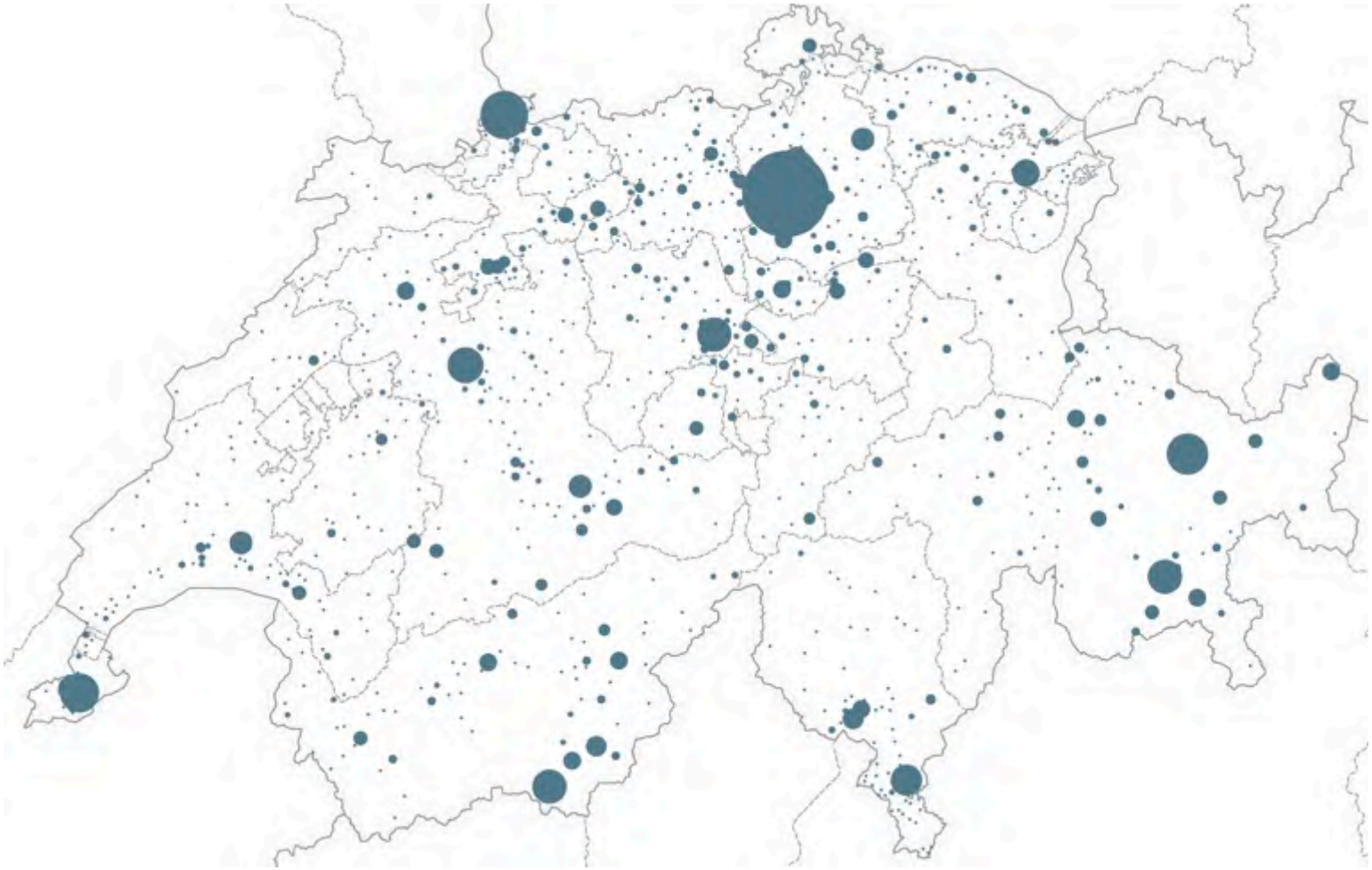
Switzerland.

- Focus
  - Outdoor Enthusiast, in our DNA - Defined focus per country, MTB, Trail, Road Cycling
  - Snow Sport Enthusiast, who invented it? - Alpine, X Country, Freetouring, Pow Pow
  - City Breaker – Art de Vivre, turquoise blue waters, healthy, organic, slow paced bliss.

- What works in the Nordics
  - Responsible, sustainable travel experiences – it's happening now!
  - Authentic and organic encounters – local urban or rural culture
  - Mobile and Video consumption – quality and usability of mobile sites

Austria.

Switzerland.



56’000

17’000

10’000

3’000

1’000

Source: FSO, overnights year 2018

Opportunities Austria.

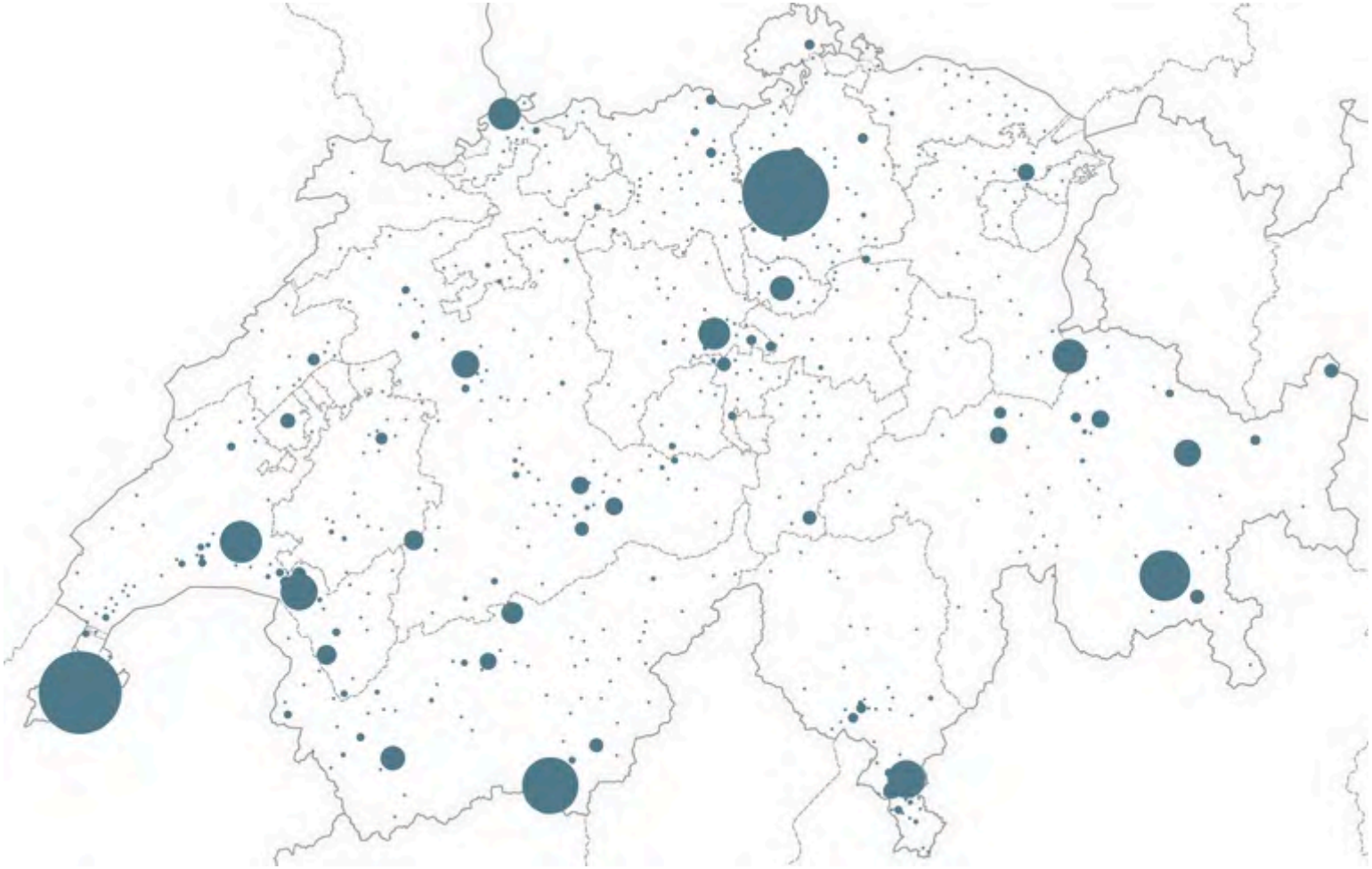
Switzerland.

- Focus
  - City Breaker
  - Culture Traveller
  - Attractions Tourer

- What works in Austria
  - City trips – weekend trips, culture, culinary
  - Touring – by car & train
  - Panoramic Tours – combination of means of traffic

Russia.

Switzerland.



60’000

25’000

13’000

8’000

900

Source: FSO, overnights year 2018

Opportunities Russia.

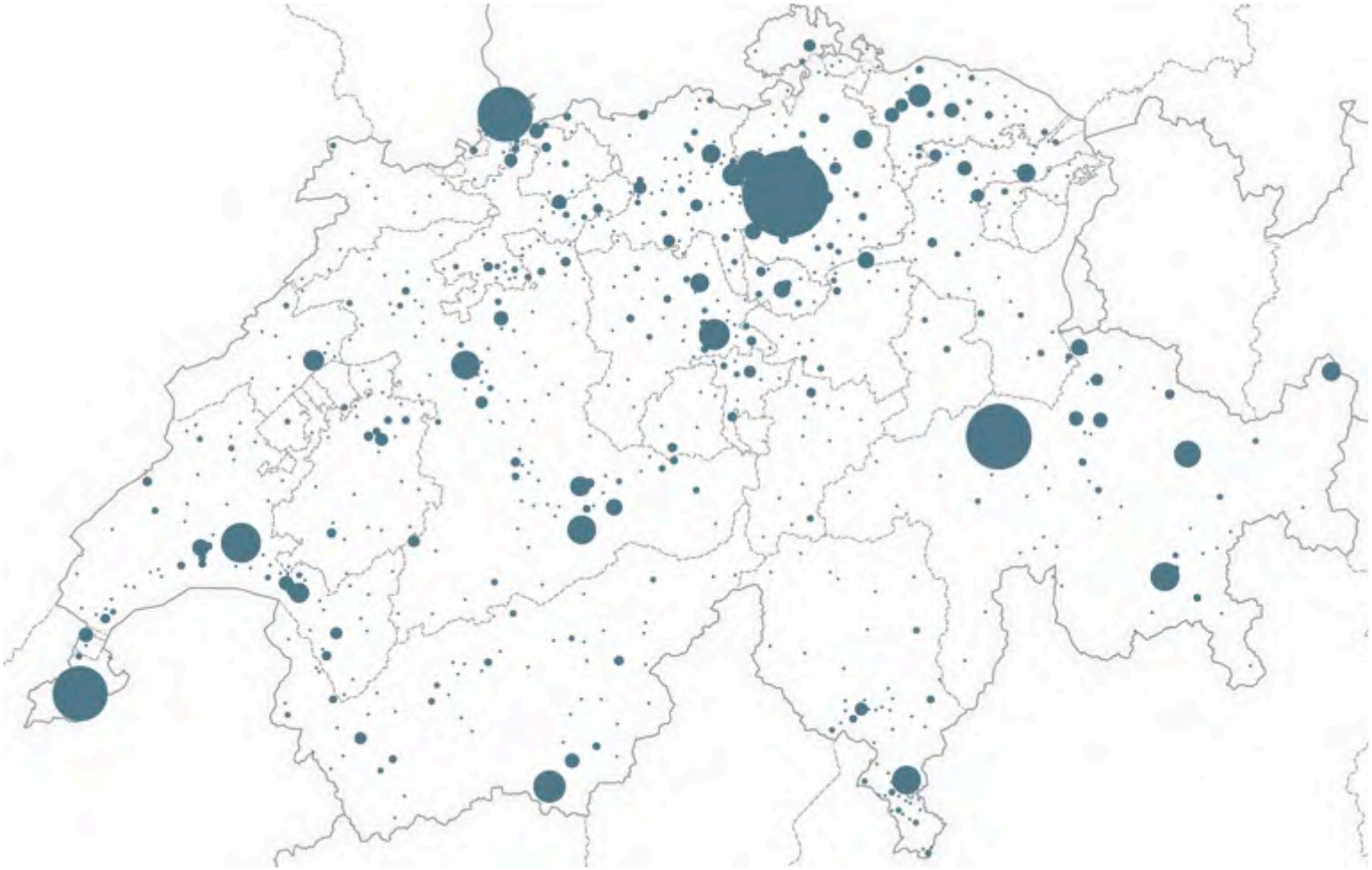
Switzerland.

- Focus
  - Outdoor Enthusiast
  - Attractions Tourer
  - Snow Sports Enthusiast

- What works in Russia
  - Luxury
  - Competitive offer for the middle class
  - SWISS Stopover program

Poland.

Switzerland.



26’000

15’000

10’000

3’000

800

Source: FSO, overnights year 2018

Opportunities Poland.

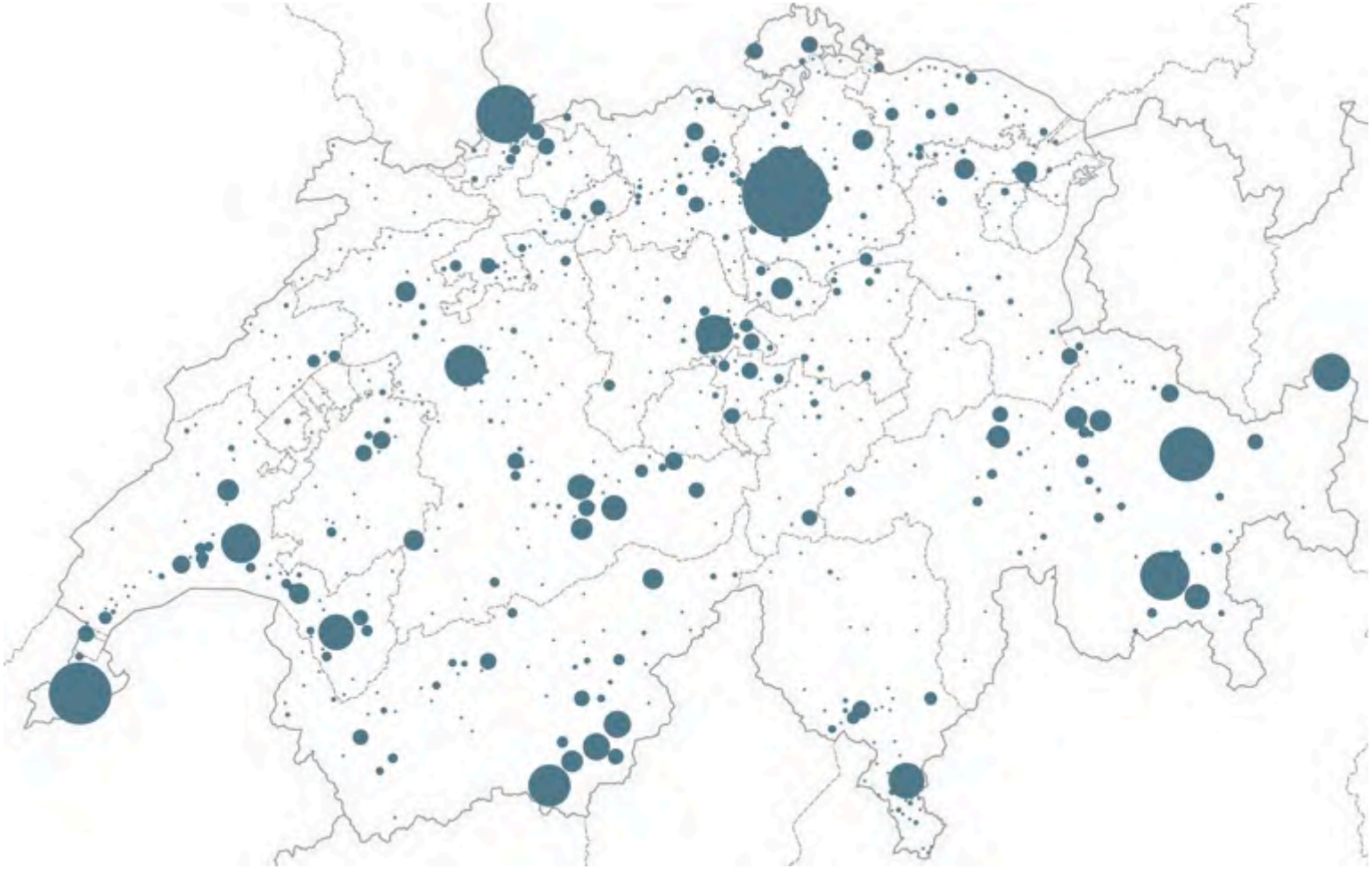
Switzerland.

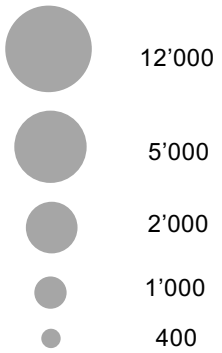
- Focus
  - Attractions Tourer – being everywhere at once
  - Outdoor Enthusiast – hiking, biking, trail running
  - City Breaker – 4 x LX to ZRH, low costs
  - Snow Sports Enthusiast – young, active, mobile, online

- What works in Poland
  - Views & Nature & Mountains
  - Online, online, online
  - Come here, build relationships, be a winner

Czech Republic.

Switzerland.





Source: FSO, overnights year 2018

Opportunities Czech Republic.

Switzerland.

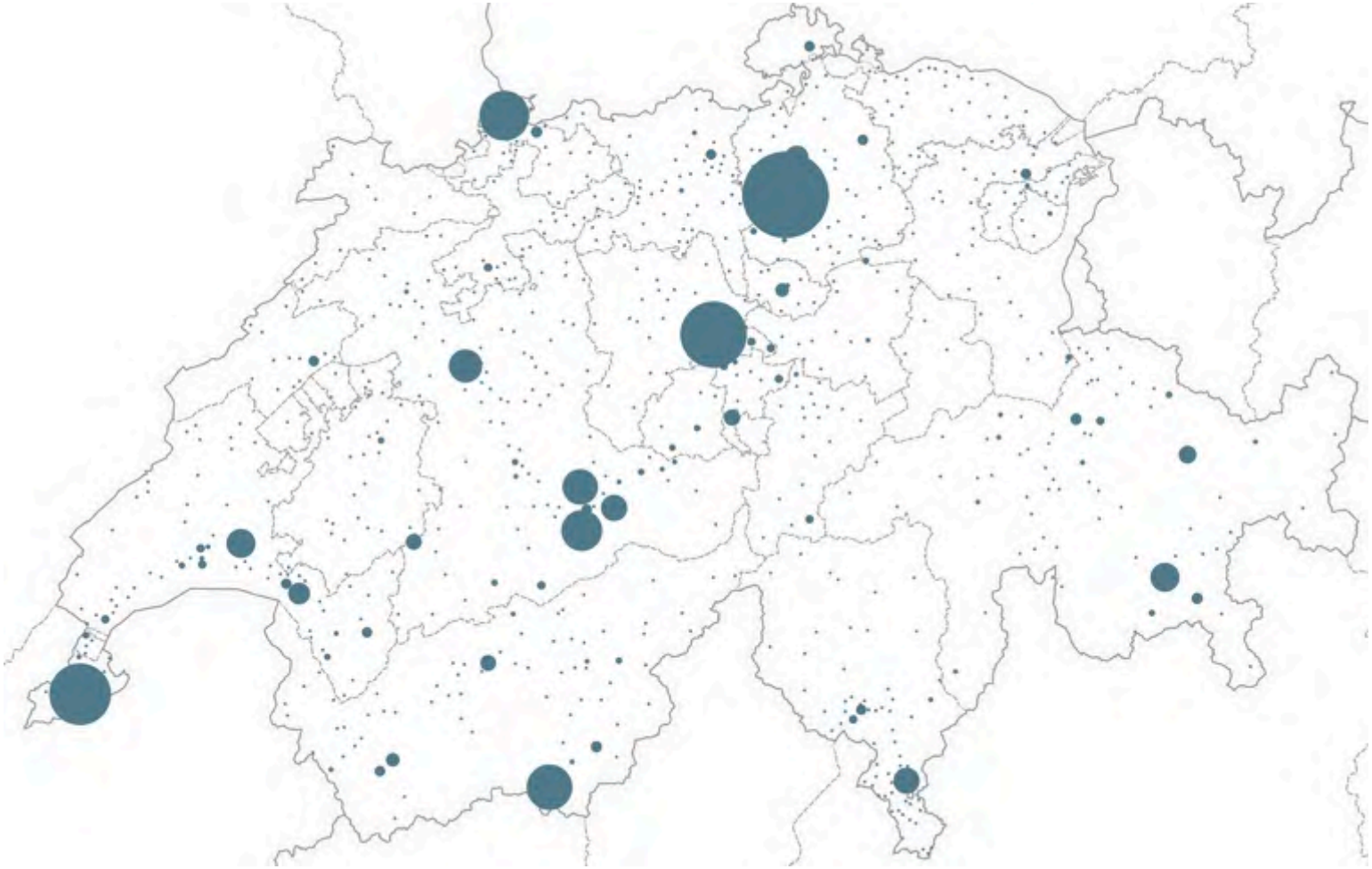
- Focus
  - Outdoor Enthusiast
  - Attractions Tourer
  - Snow Sports Enthusiast

- What works in the Czech Republic
  - Swiss nature – mountains, lakes, waterfalls
  - Swiss railways and public transport – panoramic & scenic trains
  - Active vacation – ski in winter & bike in summer

Switzerland.

U.S.

Switzerland.



430’000

250’000

120’000

50’000

20’000

Source: FSO, overnights year 2018

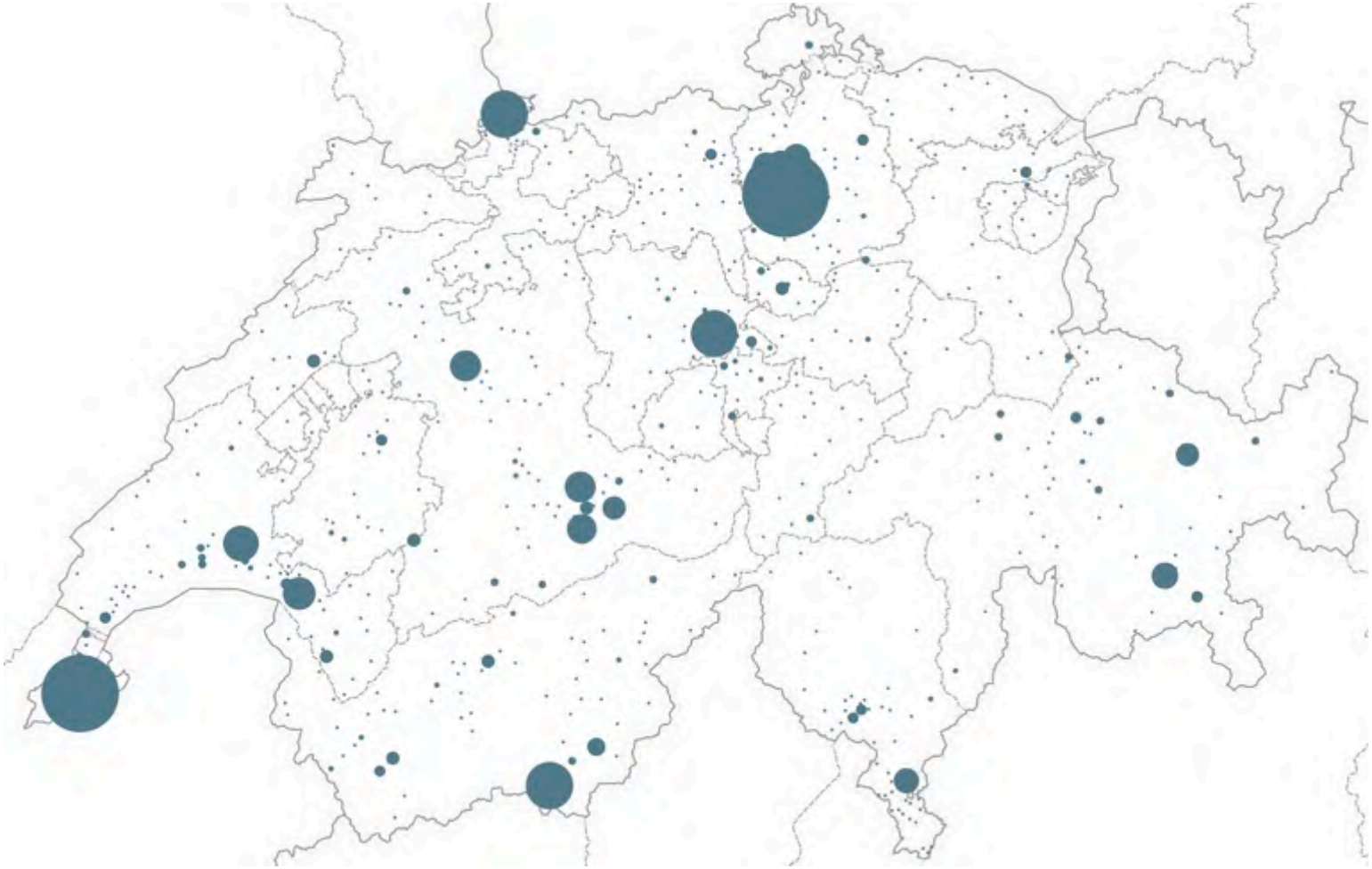
Opportunities U.S.

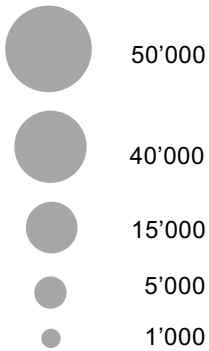
Switzerland.

- Focus
  - multi-segment approach
- What works in the U.S.
  - Back on the bucket list
  - Travel trade!
  - Trains, trails and trouvailles
  - Strong relationships and continuity
  - Look beyond digital marketing
  - A wonderful team!

Canada.

Switzerland.





Source: FSO, overnights year 2018

Opportunities in Canada.

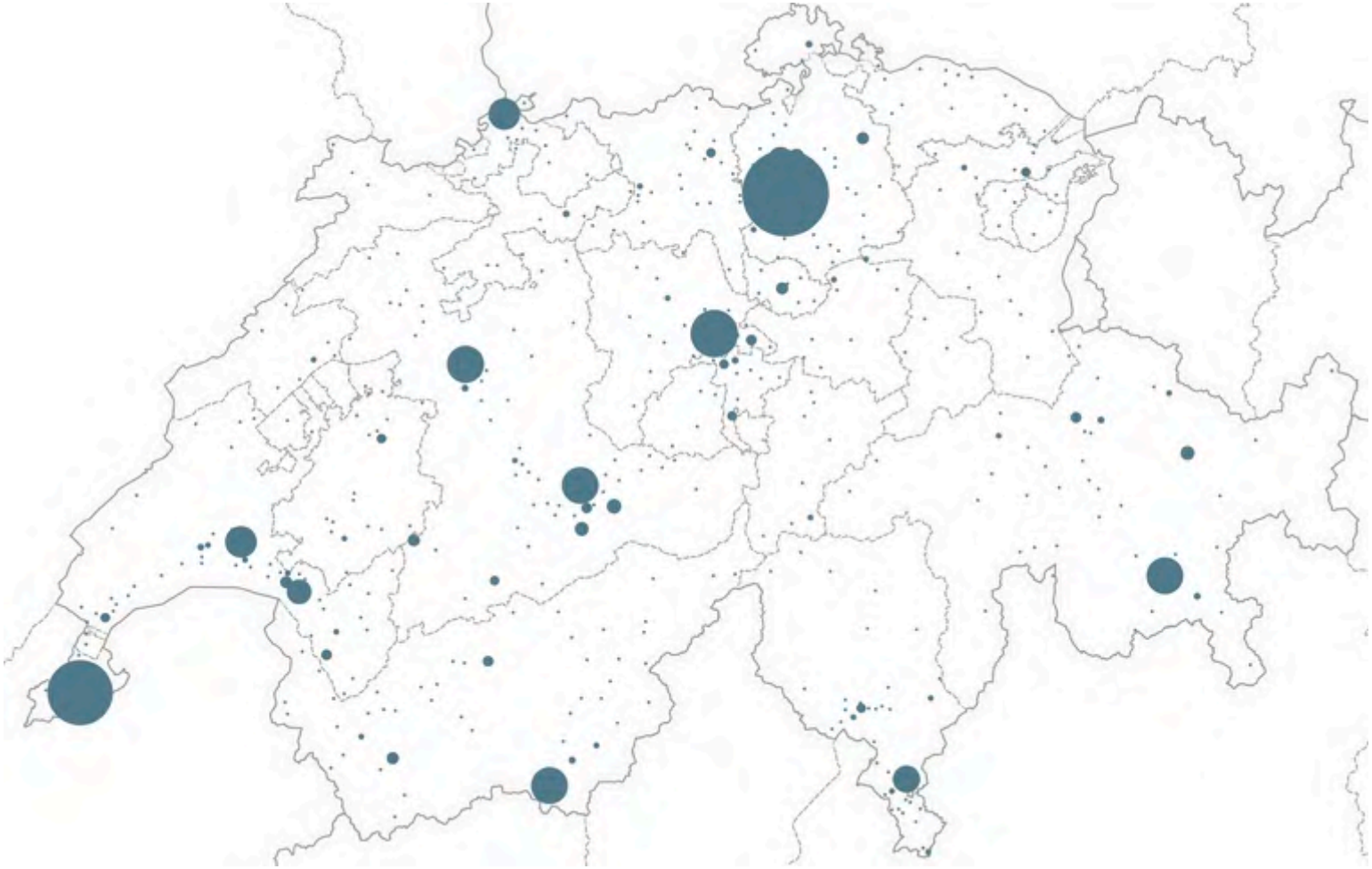
Switzerland.

- Focus
  - Nature Lover & Outdoor Enthusiast
  - Luxury Traveller
  - Attractions Tourer
  - Snow Lover & Snow Sport Enthusiast

- What works in Canada
  - Canada is not the US.
  - Campaigns: Tour operators, media and airlines
  - Momentum: Build on growth in the last 10 years and more direct flights
  - Experiences: Canadians are generous (290 CHF per day, also in shoulder season).

Brazil.

Switzerland.



60’000

30’000

15’000

10’000

2’000

Source: FSO, overnights year 2018

Opportunities Brazil.

Switzerland.

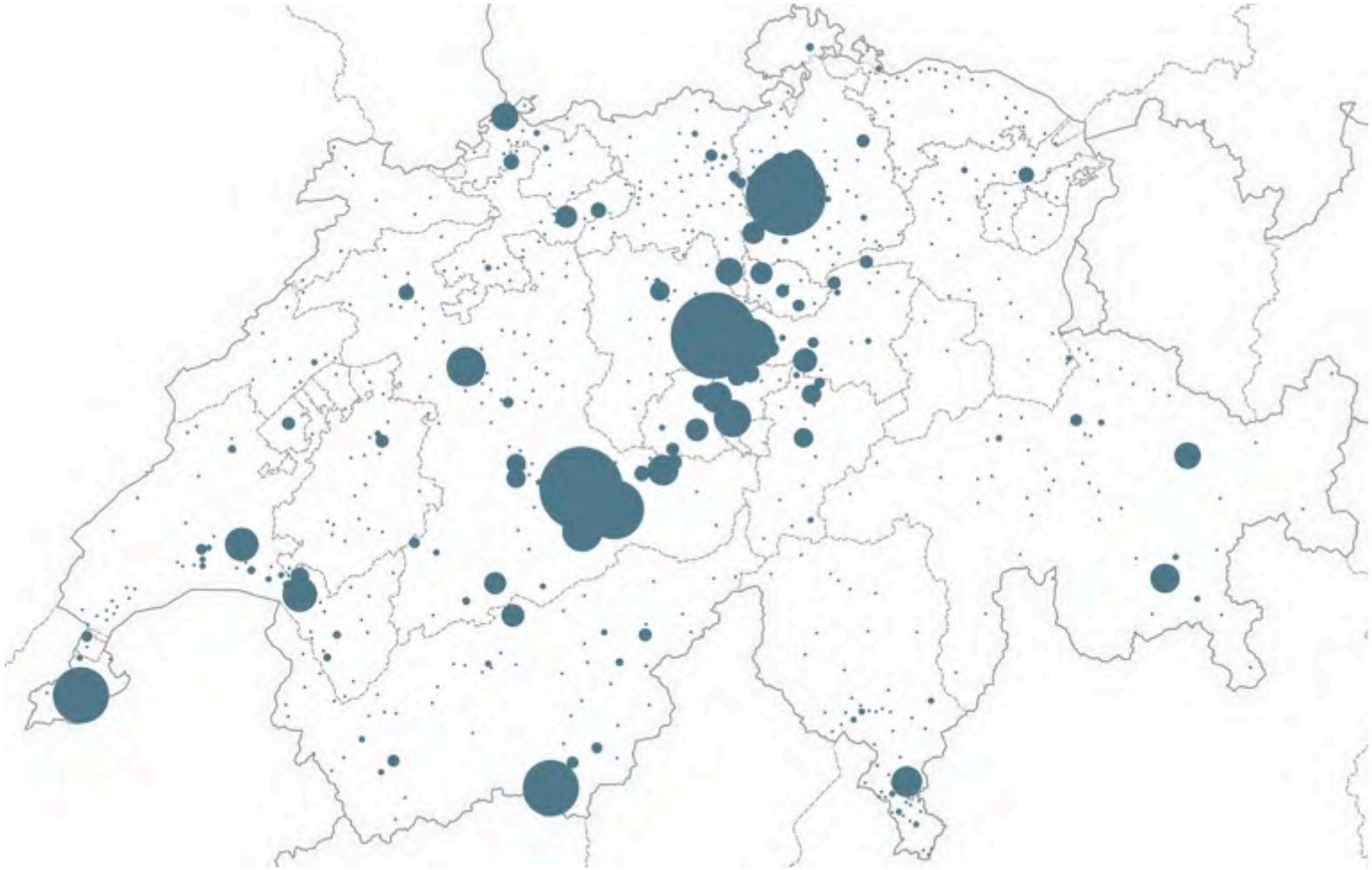
- Focus
  - Luxury Traveller
  - Culture Traveller
  - Nature Lover

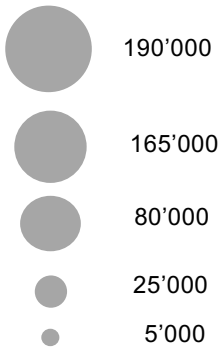
- What works in Brazil
  - Inspired by Instagram, booking through travel agents
  - PR is king! Personal network is a multiplicator (visit the market constantly)
  - City-nature experience

Switzerland.

Greater China.

Switzerland.





Source: FSO, overnights year 2018

Opportunities Greater China.

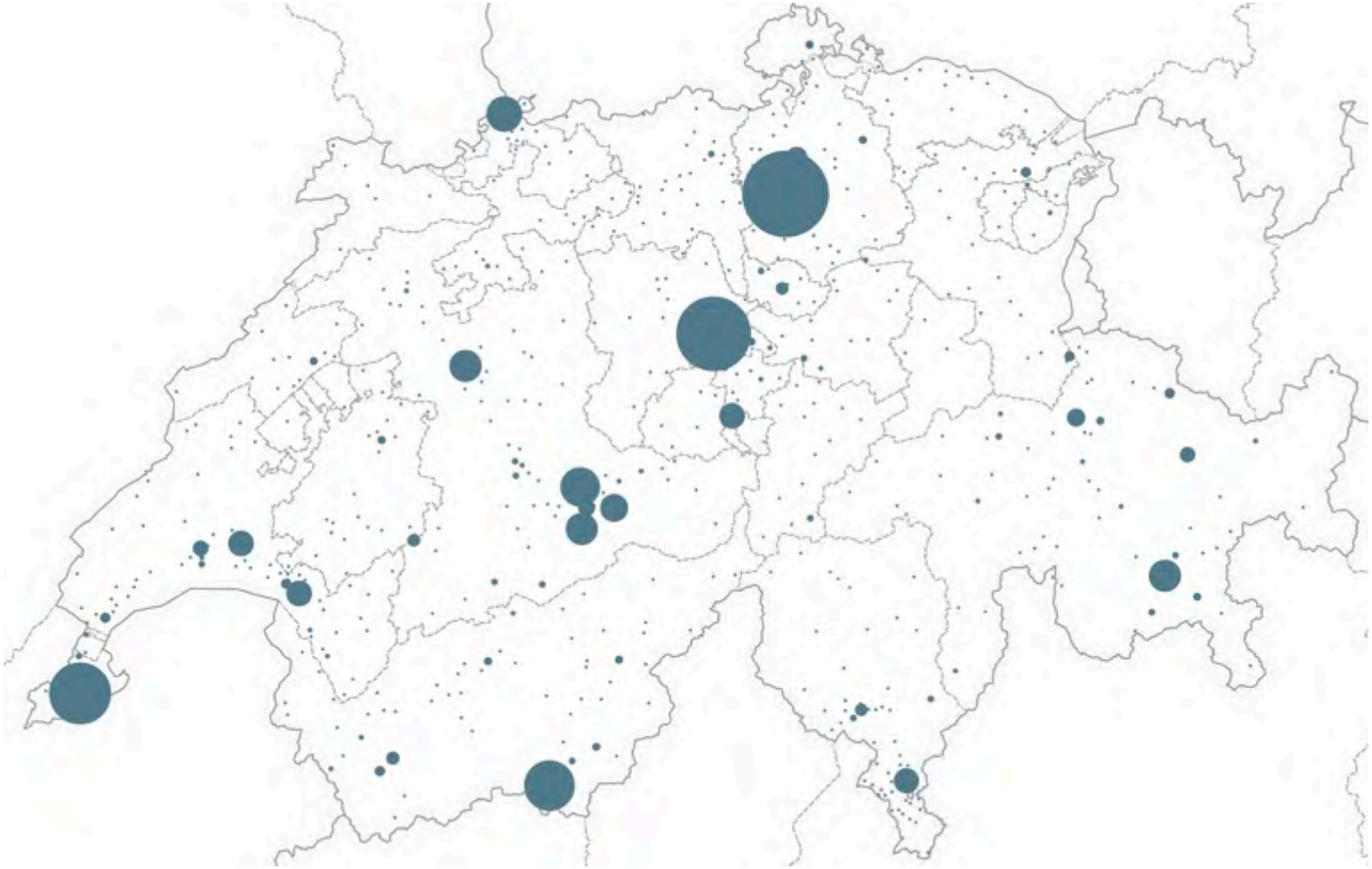
Switzerland.

- Focus
  - Summer: Outdoor Enthusiast and Attractions Tourer
  - Cities: Culture Traveller and Attractions Tourer / Autumn – National Day Golden Week
  - Winter: Snow Lover and Snow Sports Enthusiast

- What works in Greater China
  - Use Word of Mouth through targeted Influencer / Community Marketing
  - Key Account Management with a focus on new (digital) distribution channels
  - Digital Convenience for FITs: travel tips and mobile payment

Australia incl. NZ & OZ.

Switzerland.



75’000

40’000

15’000

8’000

2’000

Source: FSO, overnights year 2018

Opportunities Australia incl. NZ & OZ.

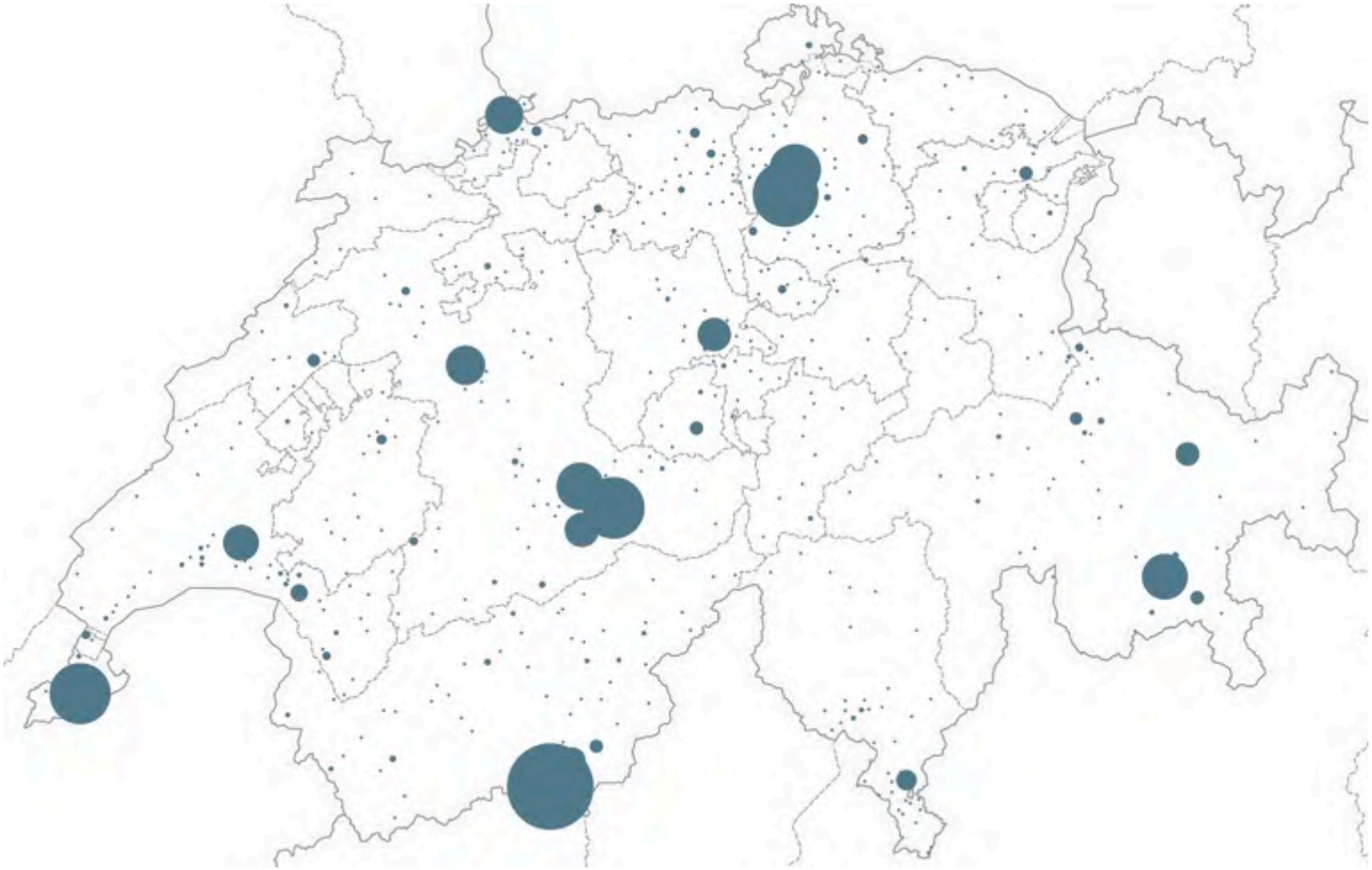
Switzerland.

- Focus
  - Attractions Tourer (72%): Rail Journeys (63%), 8+ days stay (51%)
  - Nature Lover: 48% ON in mountain regions
  - Snow Lover / Snowsports Enthusiast: + 17% ON growth winter 18/19

- What works in Australia & New Zealand
  - Media Work: Inspirational stories and experiences ("Print is the new luxury")
  - KAM: 60% book through travel agents / average lead time: 120 days
  - Digital Campaigns: Spectacular images & movies

Japan.

Switzerland.



65’000

35’000

20’000

10’000

1’000

Source: FSO, overnights year 2018

Opportunities Japan.

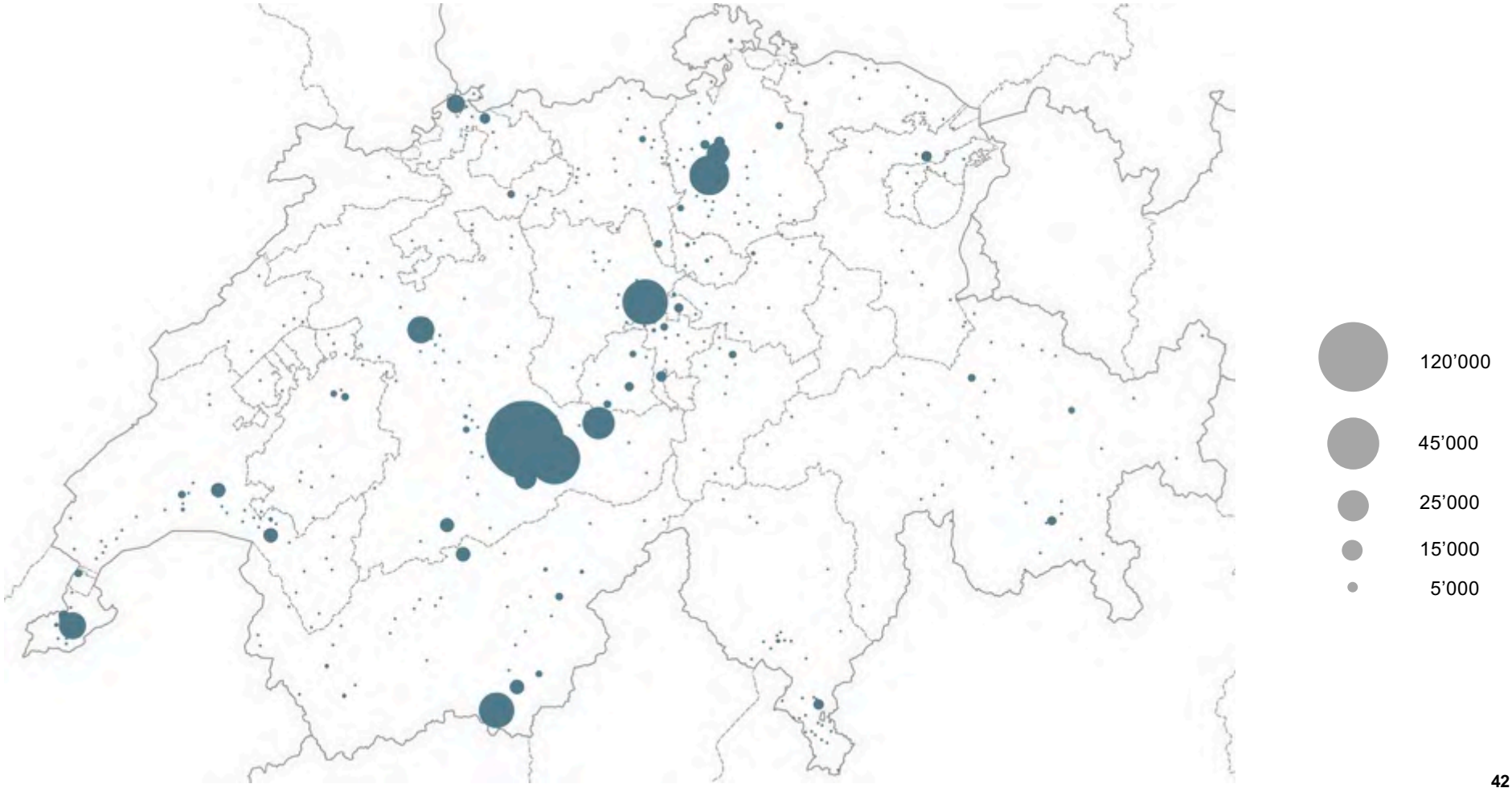
Switzerland.

- Focus
  - Image / Marketing diversification (make Heidi more sexy)
  - Tokyo 2020 Olympics and Paralympic Games
  - Key Account development (FIT!)
  - Mainstream TV travel shows
  - Strong positioning in the Japanese luxury-travel-agent network

- What works in Japan
  - Digital promotion: segments, campaigns, targeted ads in native language
  - Building trust with key accounts, maintaining relationships and engagement
  - #inlovewithswitzerland through unique products and experiences
  - Travel agents and consumers are in search of short modular packages
  - Japanese love local culture and authentic experiences

Korea.

Switzerland.



Source: FSO, overnights year 2018

Opportunities Korea.

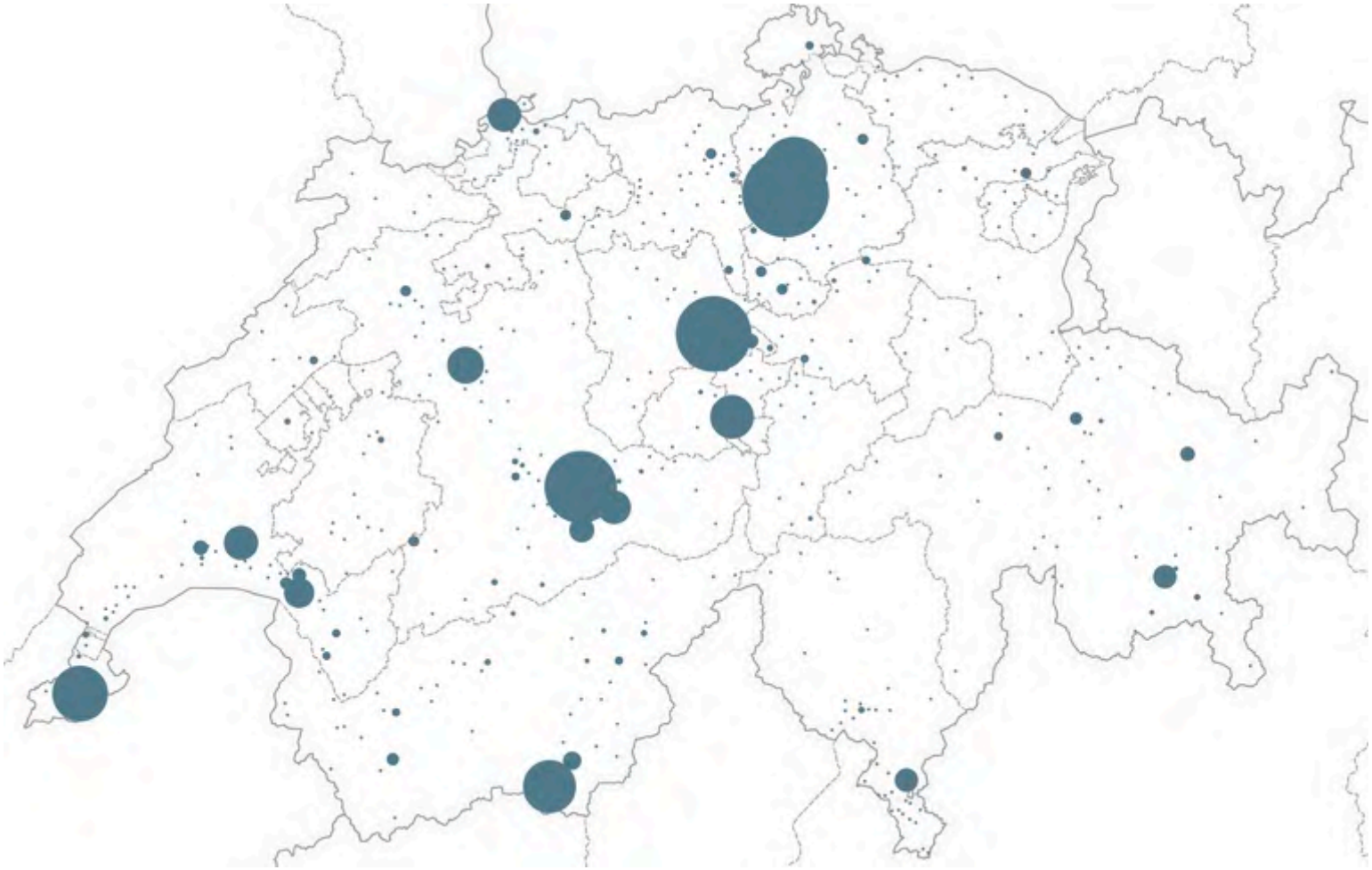
Switzerland.

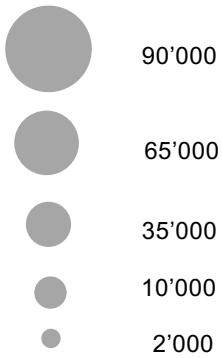
- Focus
  - Attractions Tourer
  - Outdoor Enthusiast
  - Snow Lover

- What works in Korea
  - CH Mono Destination Products : Diversification of destination and experiences
  - Solution to the lack of direct flights to Switzerland. Covered by coach from nearby cities.
  - Business class flights preferred.
  - TV shows product placement and SoMe influencers.

South East Asia.

Switzerland.





Source: FSO, overnights year 2018

Opportunities South East Asia.

Switzerland.

- Focus
  - Attraction Tourer
  - Luxury Traveller
  - Incentive Planner

- What works in South East Asia

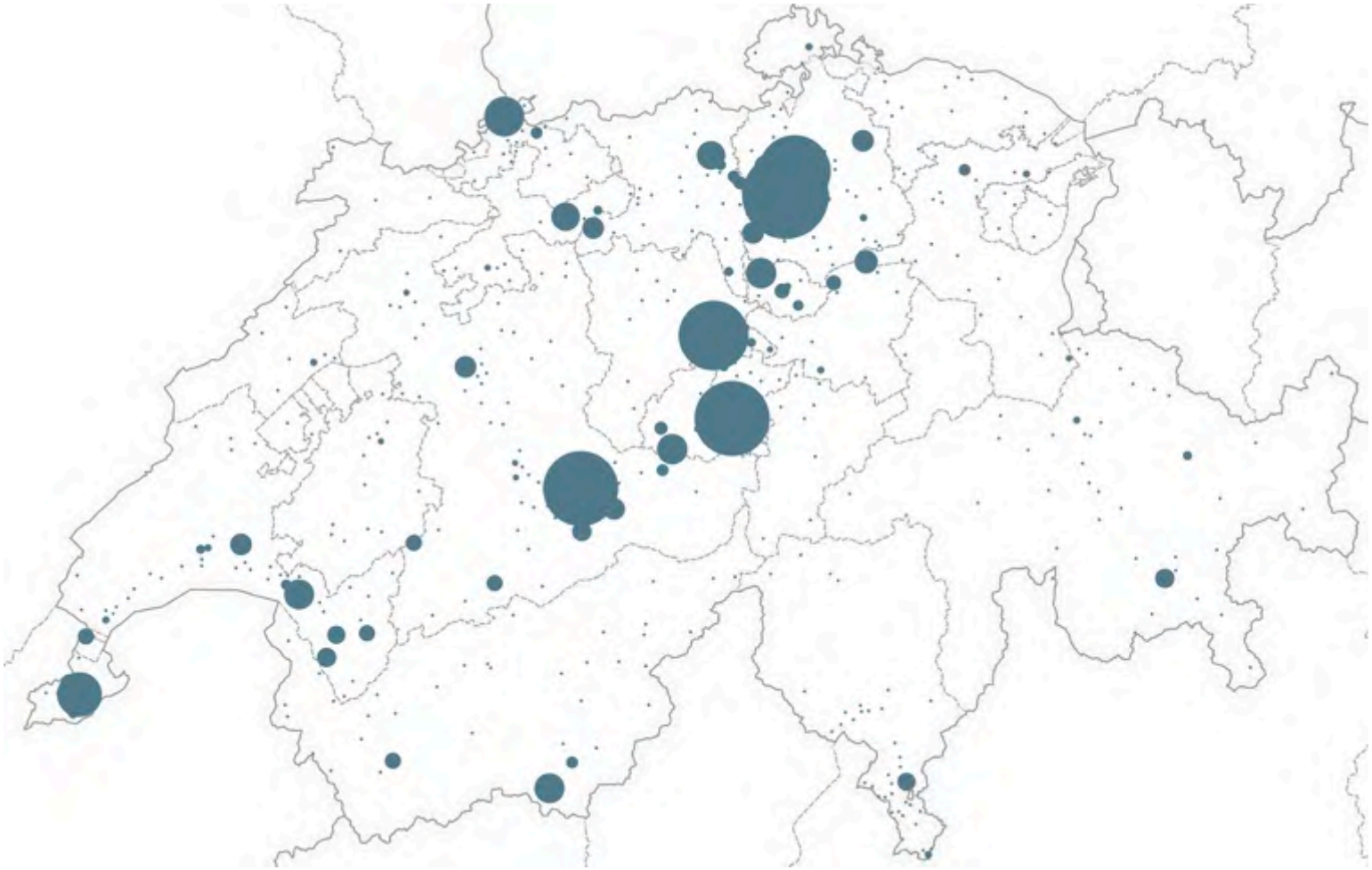
❌ relaxing and recharging

✅ fast paced and exciting
breaking a sweat

✅ fun activities and experiences
waiting for market saturation
winning as Market Key Partner

India.

Switzerland.



115’000

85’000

30’000

5’000

1’000

Source: FSO, overnights year 2018

Opportunities India.

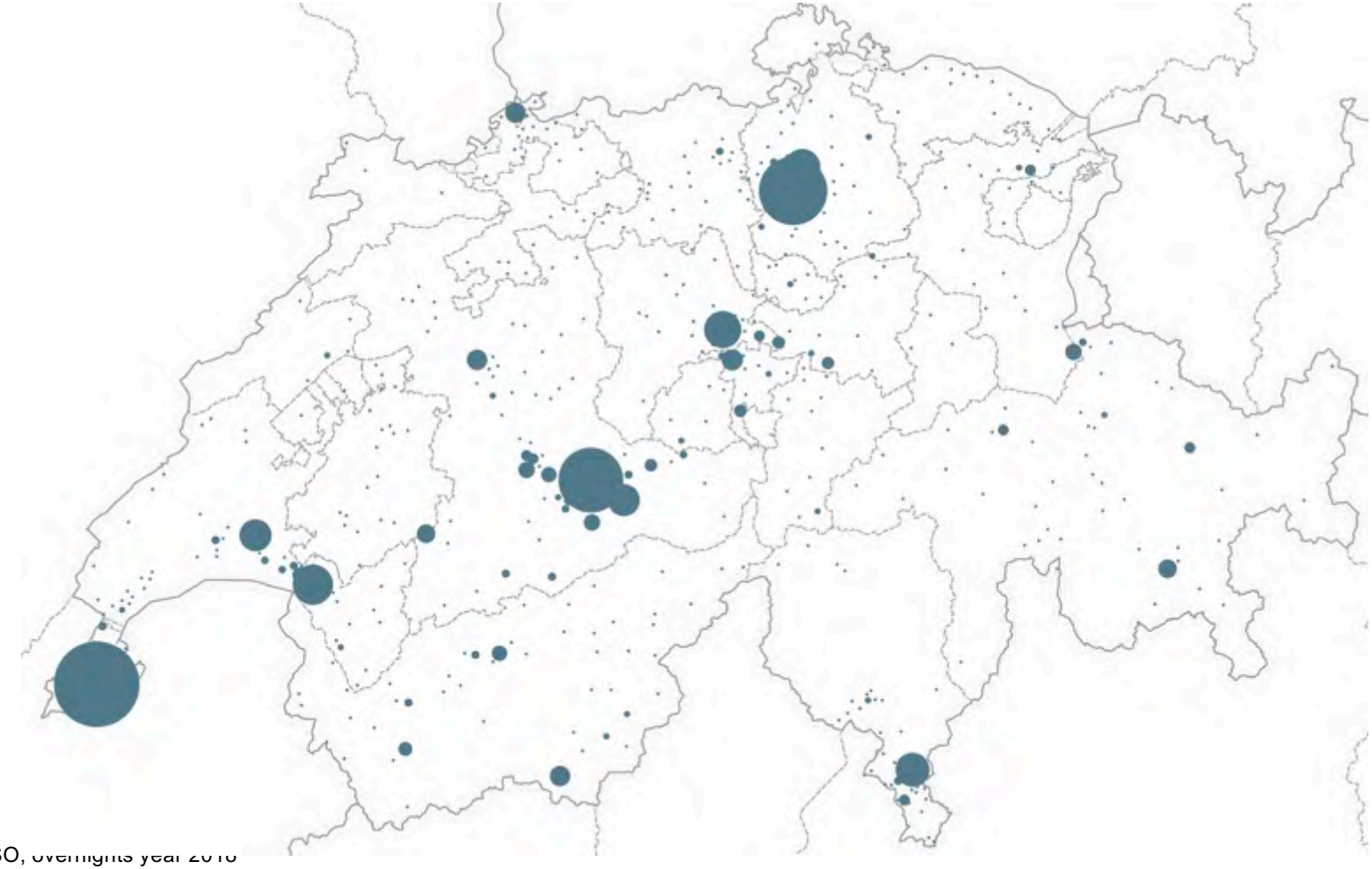
Switzerland.

- Focus
  - Attractions Tourer
  - Luxury Traveller
  - Snow Lover

- What works in India
  - High impact promotion
  - Digital innovations
  - Apartments

GCC.

Switzerland.



20’000

10’000

5’000

2’000

500

Source: FSO, overnights year 2016

Opportunities GCC.

Switzerland.

- Focus
  - Local Arabs
  - Attractions Tourer and Families
  - Luxury Traveller Summer & Winter

- What works in GCC
  - Digital, Digital, Digital.
    - It's not mobile first, it's mobile only.
    - It's not static – Arabs mainly watch videos. (IGTV, Youtube etc...)
  - Follow-up, follow-up, follow up. Long-term relationships will pay off.
  - Nature, nature, nature. Thrilling, but non exhausting.

Switzerland.

Opportunities Watchlist Markets.

Switzerland.

- Focus
  - Eurasia - “klein aber fein”
  - South America - new direct flights of SWISS by Edelweiss
  - South East Europe - relaunch of SWISS
  - Iran - dropped due to US sanctions

- What works in the Watchlist Markets
  - Best of Switzerland, Grand Tour of Switzerland and Grand Train Tour
  - Medical / Health Tourism
  - Education / Hotel Management Schools

Switzerland.